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(For details see pp. 5-6)

• **Bank debits** in Oregon during September were 13.4 per cent above their September 1958 totals, but they fell 1.4 per cent below the totals for August 1959. All areas of the state showed year-to-year gains with the Mid-Willamette Valley posting the highest relative increase of 21.1 per cent.

• **Employment** in nonagricultural industry in Oregon during September remained 4.1 per cent above year-earlier levels, but total employment rose less than 1 per cent above August 1959. Seasonal layoffs in the food and kindred products manufacturing industry accounted for the greatest relative month-to-month loss in employment. All major occupations, however, shared in the year-to-year advances.

• **The index of man hours** in manufacturing (1951 = 100) dropped to 102.6 in September from a seasonal high of 107.4 in August 1959. The current reading still stands well above the 95.6 level recorded in September 1958.

• **The average weekly earnings** of production workers in nonagricultural industry in Oregon were estimated to be $97.08 in September. This represents a very slight drop from the $97.25 reported in August 1959. It is an increase over the $95.09 average for September 1958.

• **Lumber production** in the Douglas fir region of the Pacific Northwest during September was 3.9 per cent higher than average weekly production in September 1958 and 5.8 per cent above August 1959 levels. New orders were 4.6 per cent below the figures for September 1958 and 7 per cent lower than the weekly average reported in August 1959. Unfilled orders at the end of September fell 8.6 per cent below year-earlier levels and 7.2 per cent under the previous month. Lumber inventory at September's end was 5.2 per cent higher than year-earlier levels.

• **The value of building permits** issued in Oregon during September 1959 was 0.5 per cent lower than the values reported in September 1958 and 11.4 per cent below August 1959. Year-to-year comparisons show that a substantial rise in residential permits was counter-balanced by a drop in the value of nonresidential permits.

• **Construction contracts** awarded in Oregon during August 1959 fell slightly less than 1 per cent below the value of those awarded in August 1958. The 34 per cent rise in residential contracts was overcome by declines in contracts for nonresidential and public works and utilities construction. For the first eight months of 1959, Oregon's total value of building contracts, exclusive of public works and utilities, remained 8 per cent above the comparable total for 1958.

Effect of Highway Improvement On Urban Retail Locations

By DUANE F. MARBLE

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Since the earliest days of the nation's history highways have been a powerful force for social and economic change. The primitive roads of colonial times helped to shape early America, and their modern counterparts are a force for change today. Improved highways have made travel faster, safer, and cheaper, but they have also changed trading areas, opened up new portions of the country, and caused urban areas to prosper or decline. Today the United States is engaged in the greatest road building program in its history, and the question of its impact upon America's social and economic structure is one that many persons have sought to answer.

This discussion summarizes the findings of some of the more recent studies dealing with this topic as they relate to one specific area of impact: urban retail business operations. In order to understand the nature of highway impact—to say how and then how many changes will occur because of changes in highway installations—it is first necessary to understand the fundamental spatial, or geographic, organization of the economic system.

THE SPATIAL STRUCTURE OF URBAN RETAIL BUSINESS. The ordered structuring of business land uses within the city has been intuitively recognized for many years, and the business center is one of the most pervasive focal points in the systematic organization of urban land uses. The central business district, for instance, provides the most central location in the city—the point of maximum accessibility—with the highest land values. Around this central area distinct patterns of land use (and land values) develop as accessibility diminishes. In a similar fashion, business centers below the level of the central business district provide secondary organizing foci at other accessible points within the urban area. Several empirical studies have provided evidence of the peaking of land values at major traffic intersections, and the association of such peaked land values with business use of the land around the intersections.

The selection of a proper location within this complex spatial framework has long been a problem of considerable importance to many retail businessmen. The importance of the location factor in retail operations was emphasized by H. G. Canoyer: "The location of a retail store plays a vital part in its success. Regardless of the size of the store or the kinds of merchandise offered for sale, the location must be suitable or sales volume will suffer, profits will be restricted, and failure may be the ultimate result. Although good locations frequently offset deficiencies in retailing, poor locations seriously handicap the most skillful merchandisers."

Canoyer also examined the results of several previous studies and concluded that the retail business structure of the city consisted of string streets and cluster types of shopping centers. The string street developments were made up of lines of stores located along major and minor urban arterials, and whose patronage largely came from users of the arterial rather than from adjacent

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residential neighborhoods. The cluster centers included the central business district as well as community and neighborhood shopping centers. It was assumed that the stores characterizing the larger clusters, but not the smaller, were those which required larger market areas. That is, they were more specialized, or higher order, functions. The difference observed between the kinds of business characterizing cluster and string street shopping centers was believed to result from service to consumers making deliberate shopping trips in the case of the former, and from emphasis upon service to traffic in the latter.

Many of the studies upon which Canoyer based her analysis made use of a priori classifications of business centers and were, therefore, somewhat suspect. Recently, Brian J. L. Berry, of the University of Chicago, conducted a series of empirical and theoretical studies which have greatly clarified knowledge of urban business structures and placed it upon a sounder basis. Dr. Berry found that the business structure generally conformed to Canoyer's theory. That is, the geographic relationship of businesses falls into two basic conformations. He describes them in this way: (a) *arterial* developments dependent upon the importance of the street as a traffic artery, with beads of other retail use at major intersections dependent upon nearby residential areas; (b) business *nucleations* formed by groups of retail uses hierarchically structured from the central business district through lower ranks of clusters to neighborhood centers and ultimately, individual establishments. Berry also identified certain types of businesses which tend to locate in the *arterial* and in the *nucleated* centers. For example, motels, gas stations, and lumber yards normally seek arterial locations; hardware, drug, and variety stores usually seek nucleations.

Canoyer pointed out the dynamic nature of this spatial system: "The problem of a good location is as vital a one to the man who is already in business as to the prospective retailer. Because population centers do not remain constant and the value of a site fluctuates, the problem of choosing a good location is a continuing one. A market area is a dynamic thing, constantly adjusting to the economic and social forces which determine its pattern. Therefore, the retailer must be alert to trends and anticipate significant shifts in the shopping centers. A good location of today may, in a few years, become a poor one." The spatial, or geographic, structure of the city is dynamic, and one of the major forces acting to produce new configurations and distort old ones is highway construction and improvement.

To accurately assess the impact of highway improvements upon retail businesses requires inquiry into changes in the locational structure of business concomitant with changes in the transportation network within which the businesses are located. Changes will occur, of course. As has been pointed out, favorable location upon the highway network is critical to the successful operation of most retail establishments. Location on the highway network influences the cost of obtaining articles for sale, and the cost of distribution to customers, as well as influencing the number of customers who can be induced to travel to the store, or who will pass by it in the course of their normal day's activities.

SENSITIVITY OF BUSINESSES TO HIGHWAY CHANGE. It would be best to have a summary measure available; some index of sensitivity which would measure the reaction of business establishments to changes in the highway system. Most of the studies of the impact of highway improvements on business establishments fail to provide enough depth to construct such indices of sensitivity. These studies supply only limited information on individual business types, for they were designed chiefly to measure the well-being of whole business communities. Exceptions generally were gas stations and cafes. These business types were singled out for review in many studies and, as one might expect, showed variations in sensitivity from case to case.

A recent study by Garrison and Marts is a step toward this measure; it presents a considerably more detailed picture than previous studies because an attempt is made to single out a variety of kinds of business land uses for analysis. The study also examined variations in land values and in consumer travel patterns.

The study area was Marysville, Washington, a town of about 2,500 in population, which had been bypassed in 1954 when U. S. Highway 99 was relocated. The town of Snohomish, with a population of about 3,400, and lying about 7 miles east of Marysville on U. S. Highway 2, was used as a control area. Snohomish had not been subjected to a highway relocation and its business structure is similar in many ways to that of Marysville. One simple measure of the degree of change developed by this study for each kind of business in Marysville is shown in Table 1.

TABLE 1. SAMPLE INDICES OF CHANGES IN LEVEL OF BUSINESS

Kind of Business	*Index*
Medical services	157.9
Cleaner and laundry	137.9
Electrical appliance	136.5
Barber and beauty shops	114.5
Hardware, paint, and garden supply	105.3
Gas station	102.4
Restaurants and lunch counters	87.5
Broker and law office	87.0
General store	66.2
Hotel and motel	64.6
Garage and auto repair	52.8

Source: W. L. Garrison, *et al, Studies of Highway Development and Geographic Change*, p. 111.

The sample indices of change presented in Table 1 show variations in the level of business in Marysville as compared to the Snohomish control area. The indices have been adjusted to remove characteristics of general business trends; thus these are business movements associated with the highway reorientation and independent of general business trends. The index used in Table 1 is obtained by dividing percentage changes of means in Marysville by those in the Snohomish control area. A value of 100 indicates no difference in the percentage change in Marysville from the percentage change in Snohomish; less than 100 indicates a loss in Marysville relative to the control area; a number

greater than 100 indicates a gain in Marysville relative to the control area.

The listing of movements in Table 1 also takes into account the direction of movement. A ranking of magnitude of movements without regard to direction would present an entirely different picture. In Marysville, for example, garages and auto repair shops, medical services, hotels and motels, and general stores, would all fall into the same group. This point is stressed to emphasize the directional character of the index. Several additional indices relating to the characteristics of business trends were also developed in the Marysville study.

In general, the study noted that for both Marysville and the old highway (a portion of old U. S. Highway 99 running north from Marysville) more businesses moved downward than upward, and that in each case the greatest movement of certain business types was down. It should be remembered that these observations are not grounds for conclusions on whether the highway improvement was good or bad for business in Marysville. In order to draw conclusions of this nature it would be necessary to attach value judgments to the desirability of business change of various types and there is no basis currently available for doing this. Also, the data upon which the Marysville study was based were made mainly of short-run measurements; in order to determine what ultimate changes will take place in levels of operation more data are needed over a longer period of time.

What interpretation do these indices have from the point of view of the spatial structure of business discussed earlier? The relation of short-run trends just examined to the spatial structure of business is essential to provide more conclusive meaning to the tendencies observed. Recombination of the Marysville business type on the basis of the spatial groups discussed earlier reveals how the various spatial sectors of Marysville's retail business, nucleated and arterial, fared in the short-run under the impact of highway relocation.

One problem of this recombination should be noted here. Marysville is a small urban center with a business structure much less complicated than that of large cities. As such, it becomes impossible to draw conclusions, on the basis of the Marysville information, regarding the high order nucleated and arterial centers which appear in the business structure of more complex communities. Table 2 presents an index of changes in the level of business activities by the various spatial groupings. The interpretation of the index is the same as for Table 1.

TABLE 2. CHANGES IN LEVEL OF BUSINESS ACCORDING TO SPATIALLY ASSOCIATED GROUPS

*Group**	*Index*
Nucleated B	121.1
Nucleated C	82.9
Auto Row E	80.2
Arterial A	93.5
Arterial F	101.1

* Examples of business within each group:

Nucleated B: grocery, drug, hardware
Nucleated C: clothing, jewelry, lawyers
Auto Row E: dealers in new and used cars
Arterial A: gas stations, restaurants, auto repair
Arterial F: motel, shoe repair, furniture

Source: W. L. Garrison, *et al, Studies of Highway Development and Geographic Change*, p. 116.

Table 2 shows that the business groups most sensitive to highway relocation and the removal of through traffic from Marysville were the nucleated groups B (grocery, etc.) and C (variety, clothing, etc.) and auto row E and arterial A. Arterial F, the supplies and repair group, changed but little. Groups C and E lost more business in this particular situation of highway impact, in comparison with the control area, and group C gained the most. While the control area was declining absolute gains were recorded by group B, absolute losses by group C. For groups E, A, and F, both the study area and the control area were losing business, but at different rates.

EFFECT OF HIGHWAY IMPROVEMENTS. The evidence developed to date by studies of the effect of highway improvement upon retail business operations seems strong enough to warrant the conclusion that highway impact means a structural sensitivity leading to greater centralization of nucleated business establishments. With the greater ease of movement permitted him by modern high ways, the consumer will purchase high order goods in specialized centers to replace the same transaction in lower order centers. The impact of highway improvement appears to be in terms of more efficient operation of commercial centers.

A second conclusion to be drawn from an examination of the data presented by the various studies is that a rearrangement of the arterial groups is taking place. These business establishments are sensitive to changes in traffic volume, and when they relocate in areas with higher traffic volume the result is also presumed to be a more efficient level of operation for these businesses.

Most of the studies made to date have concerned themselves with smaller urban centers. Horwood and Boyce have made the only study currently available which deals with more complex commercial centers, especially the central business district. They concluded that the greatest impact upon the operation of these centers would come from intercity rather than intracity transportation improvements. Large regional capitals could expect to experience more central business district growth than the smaller cities in their hinterlands because of the formation and concentration of new activities.

Readers wishing to continue study in more detail of the effect of highway improvement on urban retail establishments will find the following references useful.

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Oregon Agriculture in 1959

By ELVERA HORRELL

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A quick survey of the agricultural year now ending immediately makes clear it was a season of contrast. The weather was either too wet or too dry; the crops yielded record harvests or else were total failures; some farmers earned incomes higher than usual while others suffered disastrous losses. It is yet too early to assess the final results of the 1959 farm year, but enough reports have been made to the Crop Reporting Board to write a general picture of what happened in Oregon's second largest industry.

Weather was perverse, often at the critical moment. When much of the 1959 crop was being sown in the fall of 1958 moisture was short. Light winter frost damage made some reseeding necessary in the spring and late spring rains hampered farming. Fruit growers endured bouts with aphids, codling moth and mites, and apple and pear scab. April frosts made smudge pots essential in the Rogue River Valley orchards. Heavy rains in the Willamette Valley kept orchardists busy spraying and dusting to halt the development of fruit rot. There were also reports of seed-lodging. Willamette Valley grain growers were plagued by yellow dwarf leaf virus which caused estimated losses of one-fourth of the cereal grain crop in the valley. Early fall rains made harvesting difficult.

Klamath County clover seed growers were beset by root weevils and cutworms appeared in eastern Oregon grain fields. Freezing nights nipped the tips of tender new crop growth; frost damage in Umatilla watermelon fields made replanting necessary. High winds damaged both the corn and green peas in Umatilla County. Midsummer frosts damaged the fall potato crop in Central Oregon. Serious drought in southeastern Oregon ruined range feed and made it necessary for the Federal government to declare Harney and Malheur counties an area of major disaster.

Such a catalog of adversities does not mean that growing conditions were uniformly bad. The winter was, on the whole, mild and cereal grains had a good start in the spring. The spring rains aided their growth and brought needed moisture to eastern Oregon soils. The exceptional dryness of non-irrigated land in this region was offset by warm growing weather during the time grain kernels were maturing. August weather was ideal for the early grain harvest. The early fall rains alleviated the conditions of drought in many sections east of the Cascades. Irrigated crops and pasture grasses, of course, fared very well.

A preliminary tally of crop tonnage demonstates that modern technology and training leave today's farmer less at the mercy of natural hazards; setbacks were sufficiently overcome to enable this year's production to come close to the 1958 total. It is expected that the completed record will show that the tonnage for fruits, nuts, vegetables, and seeds will exceed last year's harvest.

Corn holds the spotlight among the Oregon grain crops this year. Based on October 1 estimates, expectations are for a harvest of more than four million bushels. This is sharply above last year's record output and more than two and one half times the average for the past ten years. The harvest of barley may be about the same as last year. But oats, wheat, and rye are down; hay, too, falls below last year's above-average crop.

Extremes in weather in the Klamath Basin made for irregular growth of the potato crop with a resulting small harvest; there is, however, a high proportion of table stock and low cullage. The harvest of hops was greater this year than last; sugar beet and peppermint crops were smaller.

Oregon's tree fruit and nut crops will exceed last year but will be below the average yield. Peaches, pears, prunes, and filberts are ahead of the 1958 reports; apples and walnuts lag behind. The sweet cherry crop was nearly the same this year as last. Official estimates of total small fruits harvest are not yet in, but, based on the amounts of berries delivered to processors during the season, the expectation is that this summer's crop will be second only to 1957. This year's strawberry crop broke records with an average yield per acre of 5,800 pounds. This is the first time yields for the entire state have averaged more than 5,000 pounds per acre. A record crop of cranberries is now being harvested for the holiday markets.

Seed tonnage is high this year with records chalked up for crimson clover, red fescue, Chewings fescue, perennial ryegrass, and Marion bluegrass. Bentgrass production is close to record.

More vegetables were harvested this year, both for the fresh market and for processing. On the basis of weight, sweet corn nosed out snap beans as Oregon's major processing crop. Snap bean tonnage for processing was estimated at slightly below the record crop of 1958. Green pea tonnage for processing was estimated to be sharply above last year but nearly a tenth below the record output of 1956. The canning beet harvest topped last year's.

The fresh market crops varied in success. This year there were larger harvests of asparagus, broccoli, cabbage, carrots, cauliflower, lettuce, onions, but smaller harvests of sweet corn and tomatoes. The cantaloupe crop is greater this year than last, but the watermelon crop is smaller.

The total output of livestock and livestock products is heavier than last year. The output of milk is running somewhat behind that of last year, but the production of eggs thus far, is ahead. Meat animal production is up about seven per cent; this is based on the report of weights of commercial livestock slaughter through August. The greatest increase, 24 per cent, comes in the pig crops. Sheep and lamb slaughter is up about 15 per cent. Cattle, which makes up more than half the slaughter, is a shade below the same period last year. The total weight of calves is nearly the same as last year .

Prices for crops are slightly better for the first three quarters of this calendar year but prices for livestock are averaging a trifle below the same months in 1958. There are, as always, individual variations within categories, and, of course, final figures are not yet tabulated. Thus far, however, most crop groups carry higher price tags.

The major exceptions are potatoes and wheat. Potato

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prices lagged behind 1958 prices early in the year. A turning point came at mid-year and potato prices are now considerably above the same months of 1958. Wheat prices continue to lag. Increases in prices of other major crop groups range from small increases on fruits and nuts to good increases on seed crops. In livestock, this year's lower prices are affecting hogs, broilers, and eggs. Beef cattle prices are higher this year and lamb prices are lower. Dairy producers have seen almost no price changes on their products this year.

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Business Failures. The Dun and Bradstreet report on commercial failures is considered an indicator of business health. The figures for Oregon follow:

	1958		1959	
	Number	Liabilities	Number	Liabilities
Jan.	46	$1,110,000	25	$ 515,000
Feb.	52	1,550,000	38	909,000
Mar.	46	818,000	54	1,161,000
Apr.	41	698,000	29	497,000
May	52	1,334,000	42	632,000
June	32	840,000	25	765,000
July	46	929,000	52	953,000
Aug.	51	1,100,000	56	1,015,000
Sept.	26	423,000	34	534,000
Oct.	56	939,000	---	---
Nov.	37	951,000	---	---
Dec.	47	616,000	---	---

For the first nine months of 1959, there were 355 business failures in Oregon, with total liabilities of $6,981,000. For the comparable period in 1958 there were 392 failures, with liabilities of $8,802,000.

Multnomah County Real Estate Transactions. During Sept. 1959 there were 783 real estate sales amounting to $8,509,409 in Multnomah County. Of these, 580 were residences with a total sales price of $6,146,096; 157 were vacant properties totaling $758,022 in price; and 46 were business properties with a total price of $1,605,291. Additional information follows:

	Sept. 1959	Aug. 1959	Sept. 1958
Number of sales	783	811	930
Value of sales	$8,509,409	$10,414,575	$10,053,977
Number of mortgages	840	935	853
Amount loaned	$10,605,395	$10,847,962	$10,167,179
Number of sheriff's deeds	10	3	15
Amount of sheriff's deeds	$121,582	$13,284	$153,613
Average residential selling price	$ 10,600	$12,099	$ 10,945

Construction. The Bureau of Business Research, in cooperation with the F. W. Dodge Corporation, reports August 1959 construction contracts in Oregon had a total value of $31,834,000. This is 1 per cent below August 1958. Comparative data, in thousands of dollars, follow:

	Aug. 1959	July 1959	Aug. 1958
Nonresidential	$ 9,915	$ 6,369	$11,666
Residential	15,359	21,380	11,447
Public works & utilities	6,560	10,045	9,034
Totals	31,834	37,794	32,147

Nonresidential construction was 785,000 square feet in August 1959 and 776,000 square feet in August 1958. In August 1959 contracts were let for 1,139 residential units totaling 1,444,000 square feet. One year earlier there were 935 units totaling 1,128,000 square feet.

The cumulative total for the first 8 months of 1959 shows that the value of building contracts in Oregon was 8 per cent higher than for the comparable period of the previous year. For the eleven western states the cumulative 8 month total for 1959 was 16 per cent higher than for the previous year. The national total was 17 per cent higher for 1959 than for the comparable period in 1958. The figures quoted in this paragraph do not include public works or utilities.

Department Store Sales. Figures on department store sales are compiled by the Federal Reserve Bank of San Francisco for Portland, Eugene, and Salem. The data are released for Portland each week and once a month for all three cities.

The most recent Portland data are for the week ending October 3, 1959, when sales were 4 per cent above the corresponding week in 1958.

Percentages for the three cities for the month of August 1959, and from January 1, 1959 to August 31, 1959 have been compared to the corresponding periods of time one year earlier. Percentage changes are shown in the following table.

	Aug. 1959	Jan. 1, 1959 to Aug. 31, 1959
Portland	+13	+12
Eugene	+34	+29
Salem	+19	+17
Oregon	+15	+14

Life Insurance Sales. During August 1959, sales of ordinary life insurance in Oregon were 15 per cent lower than in July 1959 but 8 per cent higher than in August 1958. The national figures show a 7 per cent drop in comparison with July 1959 and a 6 per cent gain in comparison with August 1958.

Electric Energy. During August 1959, kilowatt hours of electricity sold by privately owned electric utilities in Oregon were 13 per cent above sales in August 1958. During the twelve months ending August 31, 1959 sales were 7 per cent above the twelve month period ending one year earlier.

Agricultural income, as indicated by cash receipts from farm products marketed (government payments excluded), rose 4.9 per cent in August 1959 relative to August 1958. An 8 per cent increase in crop income compensated for a slight decline in receipts from sales of livestock. Cumulative eight-month totals show a 2 per cent gain of 1959 income over the comparable 1958 figure.

Portland food prices fell in September 1959 from September 1958 levels. The aggregate index was unchanged from the August 1959 level. The year-to-year drop of 0.3 per cent in the entire food category was caused primarily by a decline of 2.1 per cent in the prices of food consumed at home. Prices for meals outside homes continued to rise. Within the category of home consumption, only dairy products, fruits and vegetables showed price increases over September 1958. All other groups of home-consumed food declined in price, with the sharpest drop a fall of 4.6 per cent in meat, poultry and fish. Changes since August 1959 were very slight since most components of the aggregate index either rose or fell less than 0.5 per cent. The largest change from the previous month was a 1.9 per cent fall in the price of fruits and vegetables.

All of the current data on food prices were supplied by the San Francisco office of the Bureau of Labor Statistics, a division of the U. S. Dept. of Labor.

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Employment. Information on employment in Oregon is reported each month by the State Department of Employment in Salem. The latest figures follow:

	Sept. 1959	Aug. 1959	Sept. 1958
Lumber & wood products	80,400	79,700	77,800
Food & kindred products	26,800	30,000	26,100
Other manufacturing	51,600	52,600	48,100
Total manufacturing	158,800	162,300	152,000
Contract construction	30,000	35,500	29,600
Retail trade	81,100	81,100	77,100
Government	93,500	88,500	90,700
Other nonmanufacturing	157,600	156,900	151,200
Total nonmanufacturing	362,200	357,000	151,200
Total Nonagricultural Employment	521,000	519,300	500,600

Lumber. The figures below were reported by the West Coast Lumberman's Association. They cover the Douglas fir area of the Pacific Northwest and are in thousands of feet, board measure.

	Sept. 1959	Aug. 1959	Sept. 1958
Average weekly production	167,902	158,691	161,565
Average weekly orders	148,556	159,718	155,710
Unfilled orders, end of month	587,409	633,124	642,725
Lumber inventory, end of month	825,810	786,403	784,625

Advertising Linage. Local retail advertising linage in nineteen daily newspapers in Oregon totaled 608,541 column inches in September 1959, an increase of 5.5 per cent over September 1958.

Index of Man Hours in Manufacturing. A reliable index of change in manufacturing activity is the man hours of industrial production workers. The index is made by the Bureau of Business Research from data supplied by the State Department of Employment. Figures apply only to personnel engaged in direct manufacturing; sales, office, and general administrative employees are excluded. No adjustment for seasonal variation has been made (1951 = 100). The most recent reading for Oregon includes September 1959.

	1958	1959		1958	1959
Jan.	72.1	79.1	July	87.9	100.2
Feb.	72.2	79.3	Aug.	97.3	107.4
Mar.	72.2	83.3	Sept.	95.6	102.6
Apr.	75.2	87.2	Oct.	92.4	—
May	81.0	90.3	Nov.	84.6	—
June	90.0	98.6	Dec.	82.9	—

Cash Receipts from Farm Marketing. The cumulative receipts from the sale of farm produce were $249,102,000 for the first 8 months of 1959. This is a gain of 2 per cent over the 1958 cumulative total of $243,530,000 for 8 months. The following table shows the monthly comparisons in thousands of dollars.

	1958	1959		1958	1959
Jan.	$35,193	$33,479	July	$38,912	$45,194
Feb.	23,976	21,901	Aug.	49,509	51,956
Mar.	24,275	24,117	Sept.	56,667	.....
Apr.	19,722	21,693	Oct.	37,316	.....
May	22,306	19,148	Nov.	33,314	.....
June	29,637	31,614	Dec.	29,740	.....

BANK DEBITS

Bank debits represent the dollar value of checks drawn against the deposit accounts of individuals and business firms. Bank debits are considered good indicators of current business activity. But their value for this purpose can be impaired if they include large checks used to transfer funds for the purchase of certain kinds of capital assets that are not "business activity." Each month the Bureau of Business Research collects data on bank debits from 185 banks and branches.

	Number of Banks Reporting	Debits Sept. 1959	Debits Aug. 1959	Debits Sept. 1958	Sept. 1959 compared with Aug. 1959	Sept. 1959 compared with Sept. 1958
Oregon	186	$2,038,616,588	$2,067,354,686	$1,797,879,491	— 1.4	+13.4
Portland area (Multnomah, Washington, Clackamas, Columbia counties)	59	1,270,339,892	1,280,386,807	1,122,811,031	— 0.3	+13.7
Mid-Willamette Valley (Polk, Benton, Linn, Marion, Yamhill counties)	40	245,624,923	257,311,659	202,867,669	— 4.5	+21.1
North Oregon Coast (Tillamook, Clatsop, Lincoln counties)	10	38,360,085	39,641,391	34,321,840	— 3.2	+11.7
West Central Oregon (Douglas, Coos, Lane counties)	22	185,051,349	196,451,128	163,481,422	— 5.8	+13.2
Southwestern Oregon (Curry, Jackson, Josephine counties)	13	91,121,400	98,165,876	90,766,966	— 7.1	+ 0.3
Upper Columbia River (Sherman, Hood River, Wasco, Gilliam, Wheeler counties)	9	30,767,047	29,909,184	29,259,179	+ 2.8	+ 5.1
Pendleton area (Umatilla, Wheeler counties)	8	36,987,975	42,842,409	32,496,431	—13.7	+13.8
Central Oregon (Deschutes, Crook, Jefferson counties)	5	31,918,649	30,519,931	28,423,211	+ 4.5	+12.3
Klamath Falls area (Klamath, Lake counties)	6	44,403,763	39,683,407	39,346,107	+11.9	+12.8
Baker, La Grande area (Baker, Grant, Wallowa, Union counties)	9	32,328,133	29,942,358	31,230,545	+ 7.9	+ 3.5
Burns area (Harney, Malheur counties)	5	25,713,372	22,500,536	22,875,090	+14.3	+12.4

BUILDING PERMITS

Building permits are a report of PLANS rather than of construction in actual operation. Interpretation of these data must allow for the elapse of time between the issuing of the permit and the beginning of construction. The information has been collected by the Bureau of Business Research from building departments in local governments.

	New Residential Sept. 1959	New Non-Residential Sept. 1959	Additions, Alterations & Repairs Sept. 1959	Totals Sept. 1959	Totals Aug. 1959	Totals Sept. 1958
Albany	$ 120,100	$ 83,200	$ 56,775	$ 260,075	$ 209,036	$ 131,100
Baker	50,000	24,100	24,820	98,920	141,000	233,100
Beaverton	115,128	33,585	3,530	152,243	117,790	551,608
Bend	84,500	12,116	13,124	109,740	89,032	68,900
Coos Bay	76,900	.....	18,584	95,484	35,935	24,045
Corvallis	689,005	25,600	20,720	735,325	300,020	464,085
Eugene	673,800	357,285	139,518	1,175,603	646,352	610,046
Grants Pass	15,000	62,550	21,675	99,225	146,485	116,250
Hillsboro	204,300	109,500	13,105	326,905	793,784	107,589
Klamath Falls	64,000	26,400	100,040	190,440	140,500	149,126
La Grande	82,078	6,581	6,500	95,159	118,066	149,492
McMinnville	39,000	178,977	11,700	229,737	111,483	95,330
Medford	192,600	44,473	25,880	262,953	328,535	261,953
Milwaukie	180,510	485,000	4,150	669,660	398,381	161,650
North Bend	46,320	15,300	11,820	73,440	179,628	115,370
Pendleton	129,285	276,000	12,960	418,245	73,800	109,860
Portland	1,490,135	657,865	1,193,960	3,341,960	4,345,445	2,978,015
Roseburg	35,500	171,272	146,433	353,205	850,400	97,310
Salem	366,269	171,272	70,715	567,584	3,722,784	484,673
Springfield	22,354	513,535	9,592	545,481	74,714	118,611
The Dalles	10,000	38,400	9,844	58,244	58,600	90,431
Clackamas County	882,025	36,169	28,300	946,494	443,626	1,008,738
Douglas County	22,243	233,652	6,386	262,281	39,618	83,753
Lane County	863,772	169,790	80,435	1,113,997	1,665,230	1,002,609
Marion County	667,535	141,950	8,400	817,885	737,338	825,260
Multnomah County	2,597,215	1,088,333	227,905	3,913,453	2,379,373	6,785,302
112 Other communities	984,558	274,416	380,753	1,693,727	2,787,737	1,836,566
Totals	$10,704,132	$5,196,649	$2,647,684	$18,548,465	$20,934,692	$18,650,793